Project Name
SOURCE SELECTION KICKOFF BRIEFING

PRESENTED BY
Contracting Officer Name - KO
Specialist Name - Contracts Specialist

AGENDA

- Introduction/administrative remarks
  - Facilities
  - Oral Presentations
  - Non-Disclosure
  - Information Flow
  - Conflicts of Interest
  - Certifications
- Source Selection Organization
- RFQ/RFP Key Elements
- Source Selection Process
- Source Selection Schedule

INTRODUCTION AND ADMINISTRATIVE REMARKS

Facility Information

- Facility Location
- Core hours - 9:00 am to 3:00 pm Mon - Fri
  - Limited access after normal building hours
- Telephone/fax numbers

- Office entry code

Oral Presentations

- Oral Presentations will be conducted in [*Insert Location*]
- Schedule for presentations is being developed
- [*XX*] minute presentation + [XX] minute Q&A period
- Limit to [X] presenters

Non-Disclosure

- All data is Source Selection Information and/or Proprietary Information
  - DON’T divulge anything to anyone not in the source selection organization (including your boss!!)
- Unauthorized disclosure could adversely impact competitive environment and make responsible individuals liable for penalty or fine
- Nothing leaves the facility

Information Flow

- Exchange of information must occur inside the facility or in other “secure” offices
- Contact outside SSEB is restricted
  - Support requests go through SSEB Chairperson
  - Contact with offerors goes through KO
  - Refer all attempted communications from offerors to KO
  - No discussions of your participation or the evaluation process

Procurement Integrity

- Penalties for violation of Procurement Integrity
  - Criminal
    - **5 years imprisonment**
    - **Fine of $50,000 individual/ $500,000 contractor**
    - **Both**
  - Civil
    - **Fine of $50,000 individual/ $500,000 contractor**
  - Administrative
    - **Cancel the procurement (Pre-award)**
    - **Terminate the contract (Post-award)**
    - **Suspension or debarment**
    - **Removal or other adverse personnel action**
- Title 41, US Code, Section 423

Conflicts of Interest

- Perceived or actual may result from
  - Invitations from offerors
  - Financial holdings
  - Close personal relationships
- Disclose any information which may raise concerns
- If in doubt, CYA (Consult Your Attorney)!

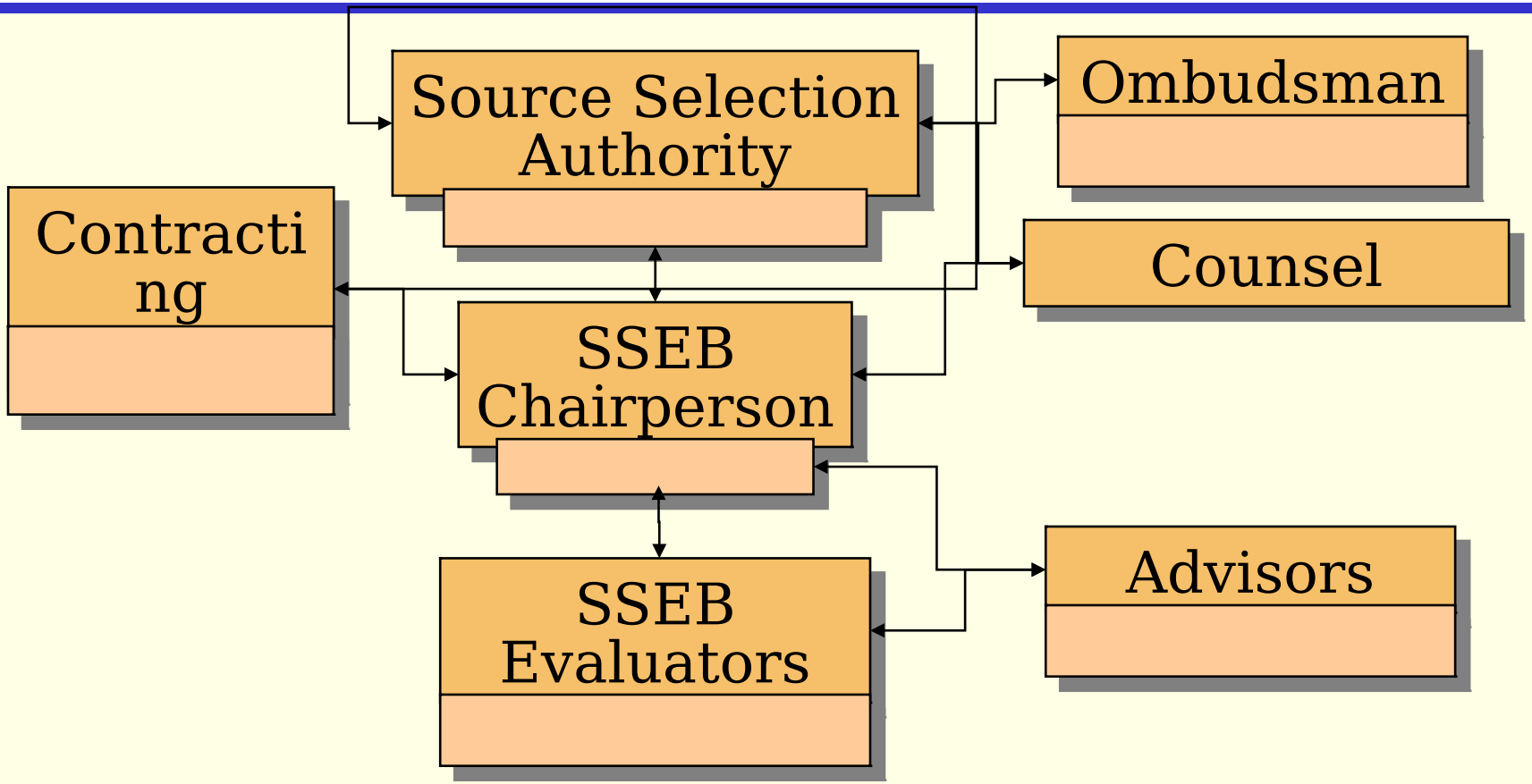
List of Offerors

Certifications

- Certifications:
  - Source Selection Certificate
  - SF 450 - Financial Disclosure Report

SOURCE SELECTION ORGANIZATION

Source Selection Organization



Duties of the SSA

- Review and approve Source Selection Plan (SSP)
- Review and approve the evaluation criteria
- Provide guidance to Source Selection Evaluation Board (SSEB)
- Prohibit unauthorized disclosure of information

- Make the final down selection decision

Duties of the SSEB Chairperson

- Manage the overall activities of the SSEB, and ensure compliance with source selection information security procedures
- Ensure all SSEB members understand the evaluation objectives, procedures, schedules, and individual responsibilities
- Serve as the focal point for coordination and consultation with the SSA
- Facilitate consensus discussions among committee members
- Ensure source selection determination rationale is fully documented
- Brief the SSA on the findings of the SSEB

Duties of the KO

- Ensures the evaluation board properly evaluates the proposals against the stated evaluation criteria
- Decide whether to conduct discussions as defined in FAR Part 15.201 and how to conduct them
- Review evaluation reports
- Conduct debriefings of the offerors, both successful and unsuccessful

Duties of the Evaluators

- Evaluate proposals
- Will not select successful offerors, but will:
  - Provide independent rating of each offeror
  - Evaluate the proposals against established criteria
    - **Write Comments**
      - **Identify Strengths**
      - **Identify Weaknesses**
      - **Provide Confidence Ratings & Rationale**

Duties of the Advisors

Include Advisor duties and limitations such as:

- Non-voting members of the SSEB and will not participate in the caucus process
- Review specified portions of the proposals as assigned by the Team Leader
- Identify preliminary issues before oral presentations
- Attend oral presentations at discretion of Team Leader
  - If selected, must attend **all** oral presentations
- Have restricted visibility of proposals
- Provide to the evaluators a consolidated report (by sub-factor) containing written comments and recommended strengths and weaknesses
- Do not assign or recommend merit /confidence ratings
- Bound by non-disclosure rules

RFQ KEY ELEMENTS

Procurement Approach

- Define the procurement approach
- Xxx
- Xxx
- Xxx
- Award a [Insert contract type]

Select the type of evaluation being used and insert the contract type for the resulting contract.

Evaluation Factors

- Factor 1 - Past Performance
- Factor 2 - Approach Overview
  - Sub-Factor 1 -
  - Sub-Factor 2 -
  - Sub-Factor 3 -

Order of Importance

PP > AO

SF1 = SF2 = SF3

SOURCE SELECTION PROCESS

Evaluation Philosophy

- Approach to evaluation:
  - Select the offeror(s) that best meet the Government's needs as described in the solicitation
- Approach to qualifications evaluation:
  - Rate qualifications against criteria
  - Evaluate only what is in qualifications
  - Qualification assertions must be supported
  - Be consistent - Be thorough
  - Document thoroughly

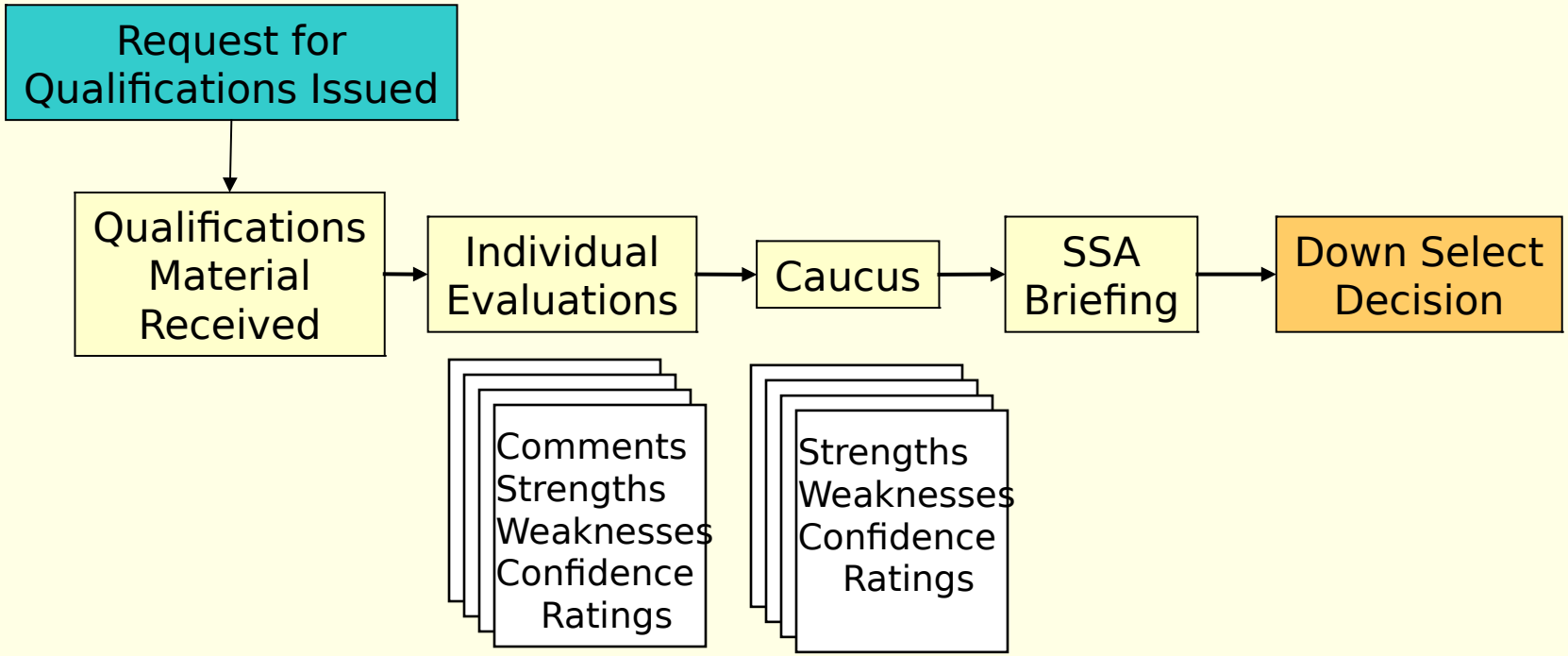
Evaluation Process

- Conduct independent review of qualifications
- Identify strengths and weaknesses
  - Statement
  - Why is this good or bad
  - Result
- Assign [merit/ confidence] rating for each evaluation element for each offeror
- Conduct caucus
- Establish data upon which the SSA will base a decision

Steps in the Source Selection Process

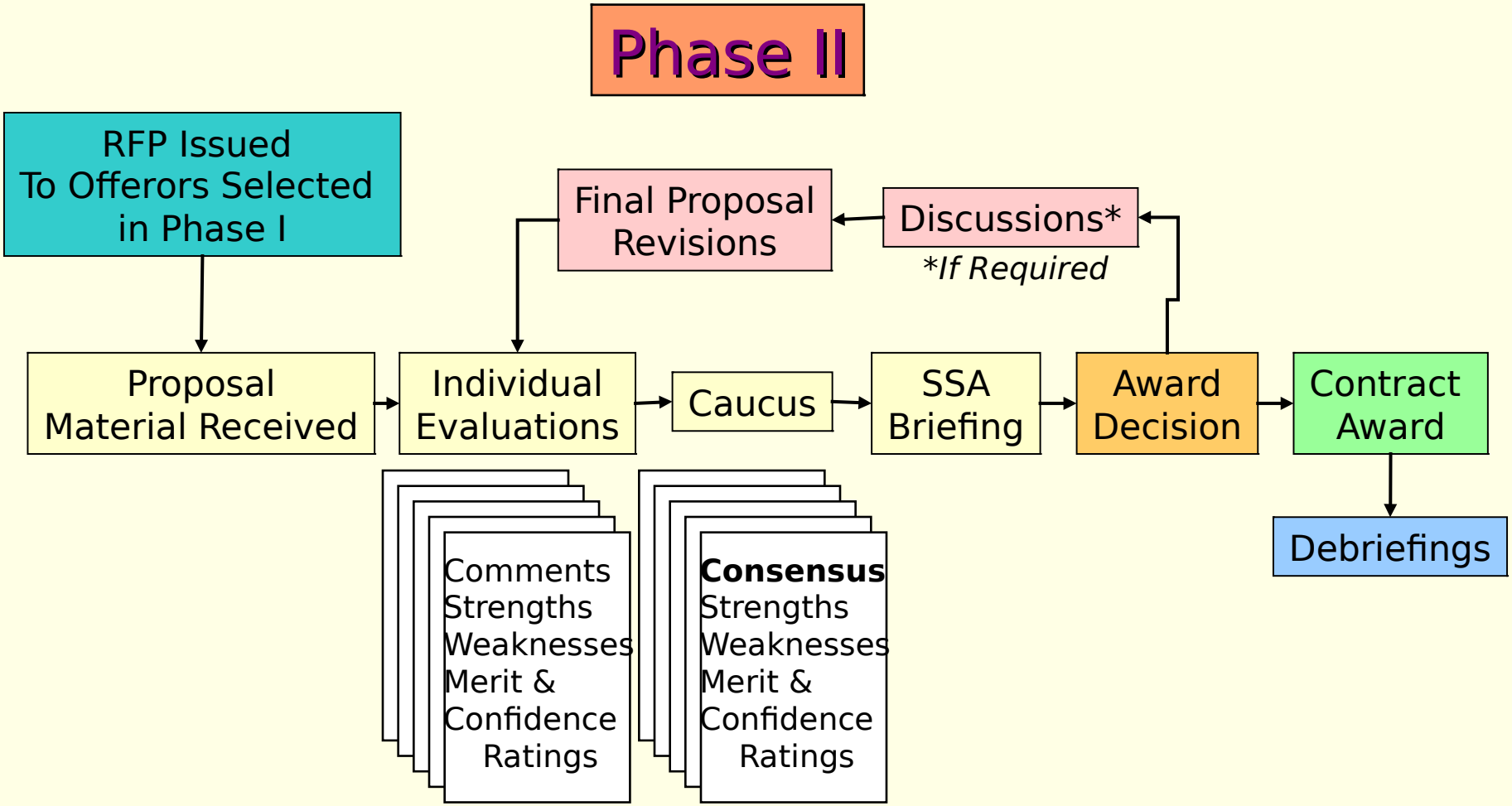
Utilize the appropriate Evaluation Process

Phase I



Steps in the Source Selection Process

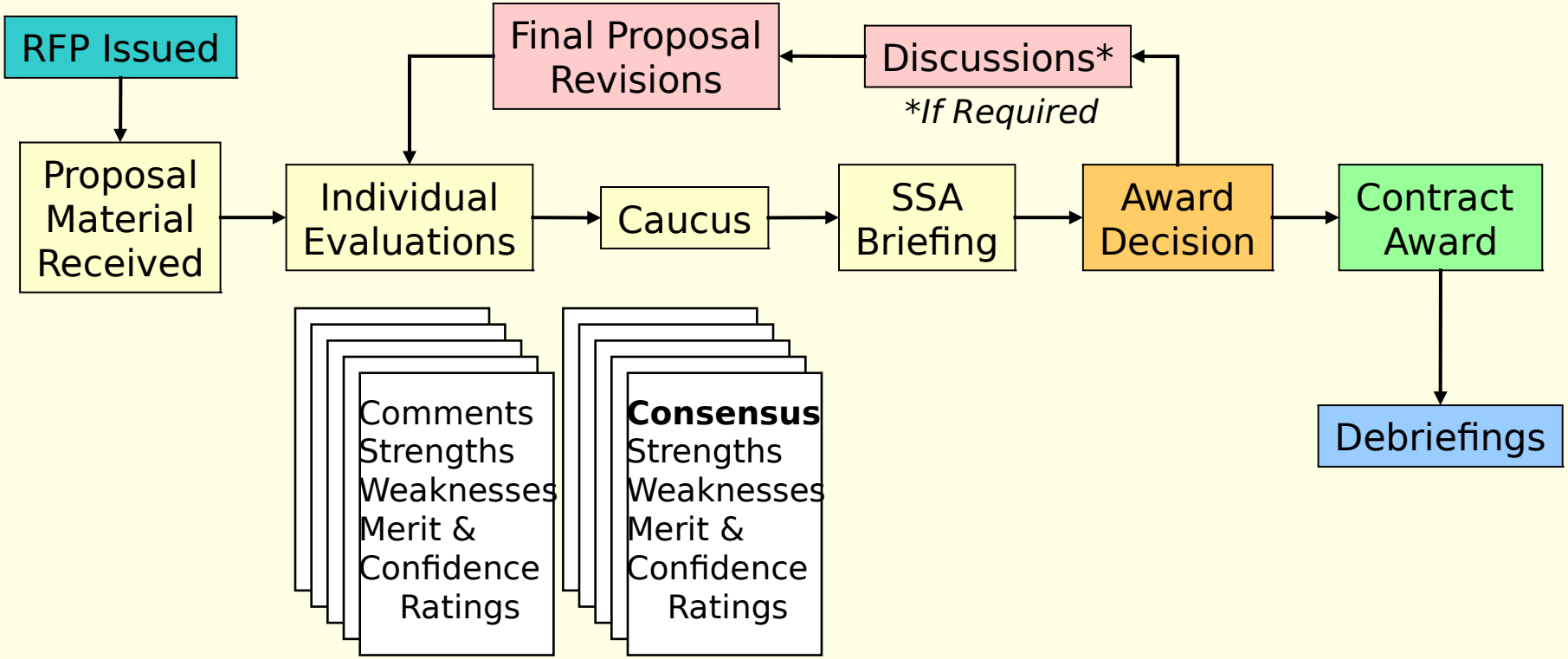
Utilize the appropriate Evaluation Process



Steps in the Source Selection Process

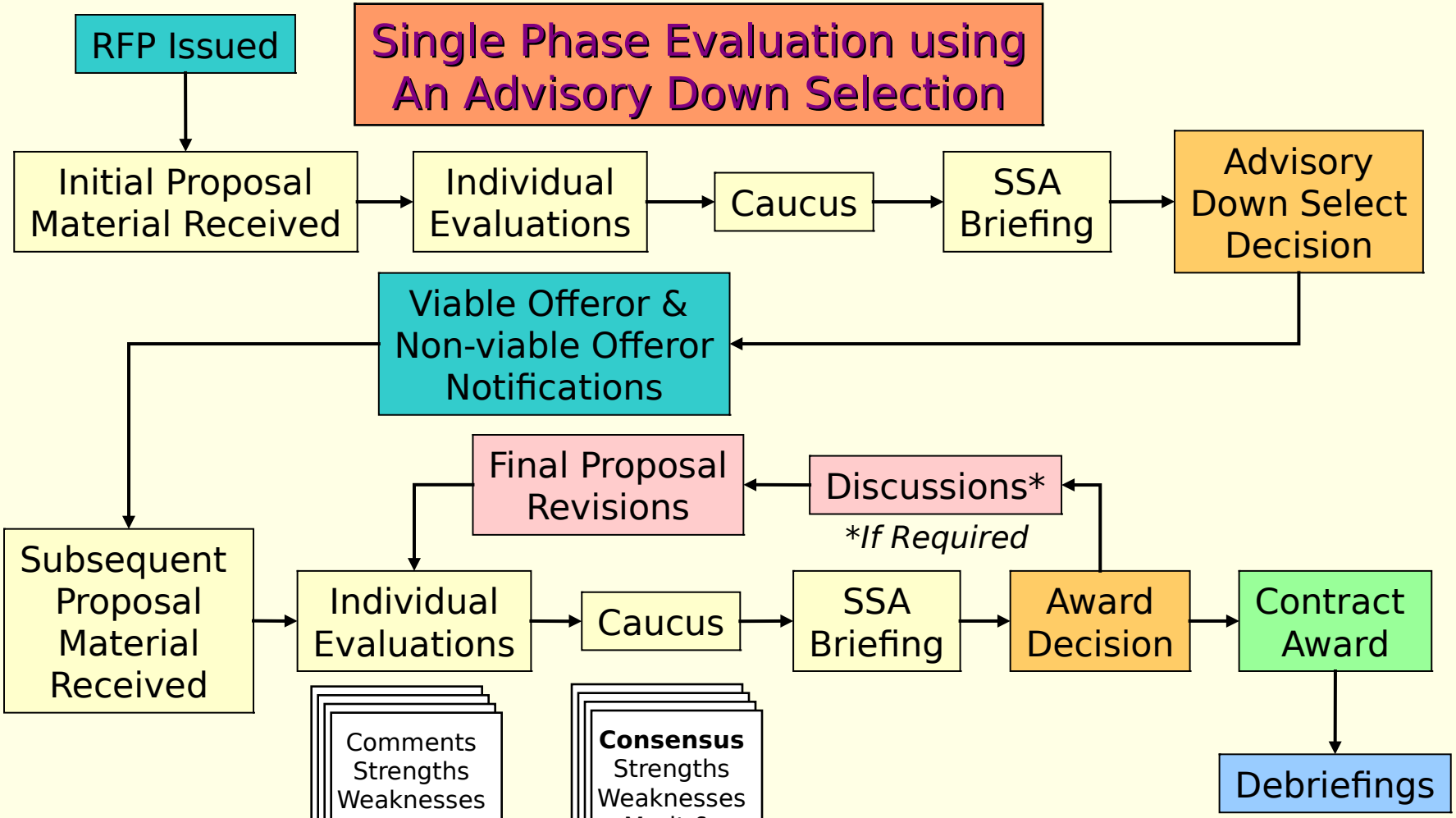
Utilize the appropriate Evaluation Process

Single Phase Evaluation



Steps in the Source Selection Process

Utilize the appropriate Evaluation Process



Merit Ratings

- Outstanding
- Excellent
- Acceptable
- Marginal
- Unacceptable

Confidence Ratings

- High Confidence
- Significant Confidence
- Confidence
- Unknown Confidence
  - Past Performance Only
- Little Confidence
- No Confidence

Definitions

- **Strength**: A significant outstanding or exceptional aspect of a proposal that exceeds the minimum evaluation standard.
- **Significant Strength**: An outstanding or exceptional aspect of a proposal that appreciably increases the Government's confidence in the offeror's ability to successfully perform contract requirements.
- **Weakness**: A flaw in the proposal that decreases the Government's confidence in the offeror's ability to successfully perform contract requirements.
- **Significant Weakness**: A proposal flaw that appreciably increases the chance of unsuccessful performance.
- **Deficiency**: An aspect of the proposal that fails to satisfy the Government's minimum requirements or a combination of significant weaknesses in a proposal that raises the risk of unsuccessful contract performance to an unacceptable level.

Definitions

- **Clarification:** limited exchanges between the Government and offerors, for the purpose of enhancing the Government's understanding of proposals, without entering into discussions, or requesting a revision to the proposal.
- **Discussions:** exchanges between the Government and offerors for the purpose of identifying to the offeror significant weaknesses, deficiencies, and other aspects of its proposal that could, in the opinion of the contracting officer, be altered or explained to enhance materially the proposal's potential for award.
  - *[State whether or not you intend to hold discussions as part of the evaluation.]*

Evaluation Documentation

Use Qualitative and Quantitative Words

Complete	**Lacking**	**Deficient**
Thorough	**Inadequate**	**Flawed**
Adequate	**Unacceptable**	**Impaired**
Acceptable	**Imaginative**	**Scarce**
Incomplete	**Solid**	**Insufficient**
	Sufficient	

NOTE: Be careful with the word <u>NO</u>.

Avoid Emotional Words and Phrases

Good	**Bad**
Wonderful	**Terrible**
Waste of time	**Stinks**

Evaluation Documentation

Use appropriate level of words

High Confidence Words

Exceptional
Superior
Complete
Outstanding

Significant Confidence Words

Excellent
Admirable
Commendable

Confidence Words

Adequate
Acceptable
Sufficient
Thorough

Little Confidence Words

Inadequate
Insufficient
Incomplete
Impaired

No Confidence Words

Unacceptable
Scarce
Flawed
Significantly deficient

Past Performance

Insert if Past Performance
Is part of the evaluation

- Project Master List
  - Projects over [*$XX]* million
  - Ongoing or completed within the last [*X*] years
- Project Relevance Summaries
  - [*X*] most relevant projects
    - **Written - 1 page per project**
  - Offeror initiated questionnaires
- Telephone Interviews
- Other databases/ sources

Criteria

- Quality
- Performance
- Schedule
- Technical

Requirements
- Cost Control
- Customer Satisfaction

Past Performance

Insert if Past Performance
Is part of the evaluation

Purple

- **High confidence**: Definition

Blue

- **Significant confidence**: Definition

Green

- **Confidence**: Definition

Utilize the Past Performance Confidence definitions appropriate for what is being procured.

Past Performance

Insert if Past Performance
Is part of the evaluation

Grey

- **Unknown confidence:** No performance record identifiable (see FAR 15.305). This is a neutral rating. It does not hinder nor help the offeror.

Yellow

- **Little confidence:** Definition

Red

- **No confidence:** Definition

Utilize the Past Performance Confidence definitions appropriate for what is being procured.

Factor
Sub-factor 1

- *Insert Submission Requirements*
- *Insert Evaluation criteria*

Factor
Sub-factor 2

- *Insert Submission Requirements*
- *Insert Evaluation criteria*

Factor
Sub-factor 3

- *Insert Submission Requirements*
- *Insert Evaluation criteria*

Factor
Merit Ratings

Purple

- **Outstanding:** Definition

Blue

- **Excellent:** Definition

Green

- **Acceptable:** Definition

Yellow

- **Marginal:** Definition

Red

- **Unacceptable:** Definition

Utilize the Merit definitions appropriate for what is being procured.

Factor
Confidence Ratings

Purple

- **High confidence:** Definition

Blue

- **Significant confidence:** Definition

Green

- **Confidence:** Definition

Yellow

- **Little Confidence:** Definition

Red

- **No Confidence:** Definition

Utilize the Confidence definitions appropriate for what is being procured.

SOURCE SELECTION SCHEDULE

Schedule

Proposals Received	DATE
Begin Evaluation	DATE
Oral Presentations	DATE
SSA Brief	DATE
SSA Decision	DATE